



Case Study

eBridge Increases Contract Return Rates with OnTask

Overview

eBridge is a web-based document management company, working with small and mid-sized businesses across verticals, as well as government agencies. Creating document management solutions requires contracts and forms to be signed by clients. Sending these documents out was a very manual process for them, costing their team time and leading to challenges in getting documents returned. eBridge was seeking a way to make the process more efficient for all parties involved and found OnTask.

Challenges

eBridge offers a solution tailored to helping businesses downsize on the amount of paper they are using, but were feeling pains when it came to their own internal processes that relied on paper like collecting contracts and forms from clients.

Before finding OnTask, collecting contracts and forms was a manual, multi-step process for the team at eBridge. First, their team would have to create a PDF and send to the appropriate party. Then, the receiver would have to print and sign, scan, and email the documents back to eBridge. Not only was this time consuming, but these outdated processes led to missed opportunities for follow-ups and longer return times on their contracts.

Initially, eBridge tried DocuSign for their automation needs. However, they made the switch over to OnTask. It was important to the eBridge team to be able to create fillable forms and reusable templates, which were pricey add-ons with DocuSign. To keep things simple and within budget, they decided to try OnTask.



"Being able to set up a form online that we have a template for so that the entire team or whoever needs to send them can really make a big difference."

- Pat Sanchez, Customer Support Manager at eBridge

Results

Using OnTask has completely transformed the way eBridge handles contracts and forms. Now, they are able to quickly send a link to customers via email to fill forms and sign documents digitally. Once completed, these documents are automatically routed back to the eBridge team.

"We've really been enjoying using OnTask – it has streamlined many of our processes and saved the entire team a lot of time and steps in getting contracts and forms signed," states Pat Sanchez, Customer Support Manager at eBridge.

In addition to simplifying the process for customers, OnTask has also improved eBridge's form return rates and reduced turnaround time. They have also seen significantly less errors on returned documents as a result.

OnTask has given eBridge greater transparency into their documents, allowing them to see where forms or contracts are during the fill and sign phase. The ability to schedule reminders with OnTask has also taken a lot of stress off the eBridge team and further improved their document return rates from clients.

"The reminders are awesome and make a big difference to me." says Sanchez. "Before, when our process was manual, we had to set our own and then send out the reminders to the client or prospective client notifying them that they had something they hadn't signed. With OnTask, it sends the reminder to them and then we also are notified that they got the reminder and that lets us know if it's something specific we want to follow up on."

Ryan Cargo, Senior Software Engineer at eBridge was the one tasked with setting up workflows and getting OnTask up and running for his organization. While there was a bit of a learning curve during the initial set-up, the OnTask support team helped answer any questions he had during the process.

"Any time spent implementing a new workflow in OnTask is worth it for the ease of use and the time saved for our employees and customers."

- Ryan Cargo, Senior Software Engineer at eBridge

After getting set up, Ryan has enjoyed how easy making edits in the tool is and the new product upgrades that have been released during his time using it. "Once you get the hang of it, everything is pretty easy. The improvements that have been added to the application have made the time I need to spend on implementing a new workflow plummet," states Ryan.

Today, eBridge uses OnTask for all of the forms and contracts that they can within their organization. As they move towards their next round of hiring, they plan to use OnTask to make their onboarding process as streamlined as their client contract process.

About eBridge

Founded in 2001 by two document-management industry veterans, eBridge specializes in providing web-based document management solutions to companies of all sizes, across all verticals. Their focus is in helping businesses reduce paper, maximize efficiency and minimize their security risks. With a team of in-house developers and support technicians, eBridge takes a customer-centered approach to developing custom document solutions.

About OnTask

OnTask is a workflow automation tool that makes it easy for users to create digital documents and forms for routing, review, approval, and signature. Whether internal or external, participants can work on documents and forms with ease, while giving administrators the ability to track files as they travel through review, and gain acceptance through verified digital signatures. For more information, visit ontask.io.